Arrivals, Departures, and Relocations of Establishments in Metropolitan Toronto - 1989 - 1990

Staff Research Report
Research and Special Studies Division
Metropolitan Toronto Planning Department - February 1992.

93-00376/

The Municipality of
Metropolitan Toronto

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April 2, 1992

To: Economic Development and Planning Committee

From: Commissioner of Planning

Subject: Arrivals, Departures and Relocations of Establishments in Metropolitan Toronto 1989-1990

Recommendation:

It is recommended that the Commissioner of Planning be directed to make the attached staff research report, entitled "Arrivals, Departures and Relocations of Establishments in Metropolitan Toronto - 1989-1990", available to staff of Area Municipal Planning and Economic Development departments and other interested researchers for information and comments on methodology.

Purpose:

(1) To receive comments from Economic Development and Planning Departments regarding the methodology developed for identifying arrivals, departures, and relocations, as reported in the attached analysis for the period 1989-1990; and

(2) to present preliminary findings on arrivals, departures and relocations for 1990-1991 in comparison with 1989-1990.

Source of Arrivals, Departures, and Relocations Information:

An employment survey is conducted annually by temporary staff under the supervision of the Metropolitan Planning Department, which collects information on the number of employees at each establishment within Metropolitan Toronto. The surveyors contact each establishment and collect data about the number of employees, whether the employees work part-time or full-time, the activity of the establishment and the land use classification of the work place. In addition, the surveyors attempt to collect information on the origin of establishments which are being surveyed for the first time at this location, and what has happened to establishments which were present at a location during the previous survey but which are no longer there.

The information on establishment start-ups, moves and departures has been collected for a number of years, but has not been used as an indicator of economic change due to a number of methodological problems with the way the information was collected and compiled. The information on new establishments and establishment moves is collected directly from the establishments and, therefore, the quality of the data is good. Information on departed firms is collected from secondary

sources and the quality of the data is not as good. The attached report is the first analysis of this component of economic change.

The Findings:

The attached research report describes the findings of an analysis of information about establishments which departed, arrived or relocated within Metro between 1989 and 1990, a period of time which was the start of the economic down turn. A preliminary analysis of similar information for 1990-1991 has also been conducted. A more detailed analysis of the 1990-91 period will be produced within 2 months as one component of a report on overall changes of employment levels in Metro Toronto. The following summary addresses both time periods and any significant changes which have occurred.

In summary:

New Business Establishments:

During the Period 1989-90:

- 4,800 new business locations, employing 24,000 people were started up in Metro. Of these new businesses, 52% located in Toronto, 17% were in Scarborough, 15% were in North York and 11% were in Etobicoke. 53% of these new businesses were shopping and service establishments, 39% were offices and 5% were manufacturing.

- 140 businesses, employing 1,800 people moved into Metro from other locations, primarily the other regions of the Greater Toronto Area (GTA). 31% of these relocated businesses moved to Etobicoke, 28% to North York and 23% to Toronto. 54% of these relocated businesses were offices, 28% were shopping and services and 13% were manufacturing.

During the period 1990-91:

- 3,600 new business locations, employing 17,000 persons were started in the 1990-91 period. A majority (48%) of these of these new businesses were located in Toronto, 18% were in Scarborough, 17% were in North York and 9% were in Etobicoke. 48% of these new businesses were office activities, 41% were shopping and services, and 7% were manufacturing.

- 140 businesses, employing 870 persons moved into Metro from other locations, primarily from other regions of the Greater Toronto Area. 32% of these relocated businesses moved to North York, 26% to Toronto, 24% to Scarborough and 16% to Etobicoke. Office activities represented 52% of establishments having moved into Metro, 26% were shopping and services and 11% were manufacturing.

Business moves within Metro:

During the Period 1989-90:

- 5,800 establishments moved from one location to another within Metro. 91% were moves within the same municipality. Of the 435 establishment moves between Metro municipalities, Toronto accounted for a net loss of 170 establishments in contrast to North York which had a net gain of 95 and Etobicoke which had a net gain of 58.

During the Period 1990-91:

- 2,700 establishments moved from one location to another in Metro. 90% of which were moves within the same municipality. Of the 435 establishment moves between Metro Municipalities, Toronto experienced a net loss of 94 establishments primarily to Scarborough and North York, in contrast to North York which had a net gain of 58 and Etobicoke which had a net gain of 19.

Businesses Lost From Metro:

During the Period 1989-90:

- It is estimated that 3,100 establishments in Metro either ceased business or moved out of Metro. The destination of only 11% of these lost businesses was identified in the survey. Since the business has left, the surveyor must depend on obtaining information about the business from secondary sources. Individuals surveyed often do not know where the business which previously occupied the location went.

- Of the 344 lost businesses with known destinations, 300 establishments employing 2,200 people went out of business and 44 establishments employing 500 people moved to other locations outside of Metro, primarily to other regions of the GTA.[1]

During the Period 1990-91:

- 8,900 businesses were estimated to have been lost from Metro between 1990 and 1991. The destination was identified for only 345 of these establishments (4%).

- Of the lost businesses with known destinations, 320 establishments employing 1,700 people went out of business and 30 establishments employing 340 people relocated outside of Metro, primarily to other regions in the GTA.

Significant Changes Between 1989-90 and 1990-91:

- 1,200 fewer new businesses started up in 1990-91 than did in 1989-90. Increases in employment resulting from new businesses were only 17,000 in 1990-90 compared to 24,000 jobs during 1989-90.

- The number of establishments relocating to Metro from outside remained the same for the two periods, however employment generated from these establishments dropped 52% from 1,800 persons during 1989-90 to 870 in 1990-91.

- 3,100 fewer establishments relocated within Metro between 1990-91, a 53 percent decrease.

- The number of establishments identified as having relocated out of Metro or gone out of business rose significantly from 3,100 establishment in 1989-90 to 8,900 during 1990-91.

- The data collected from the survey on the destination of departing establishments was an

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1 Totals may not add exactly due to rounding.

insufficient base on which to make conclusions.

Conclusions:

(1) Arrivals, departures and relocations are only part of the picture of economic change within Metro. An understanding the businesses which remained at their existing location but increased or decreased their employment levels is essential to gaining a more comprehensive view of economic change within Metro. Staff of the Planning Department are examining this latter component of economic change between 1990 and 1991 and will present a report to Planning Committee in approximately two months time. Results of this analysis should provide valuable input for economic development activities.

(2) The survey provides insufficient information regarding establishments which have departed. There is a need for follow-up surveys to determine more clearly what has happened to the establishments that depart between surveys. This could be done by means of a follow up surveys conducted by the economic development department of Metro or the area municipalities.

(3) This information should be made available to economic development departments for review and comment with the objective of pursuing reasons for change and expanding the base that provides the context for making economic development decisions. The information derived from this type of analysis can provide a base for monitoring economic performance and growth, identifying opportunities for economic initiatives, and monitoring the effectiveness of economic development initiatives and government programs and policies.

John A. Gartner
Commissioner of Planning

JB/WM/rm

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Arrivals, Departures and Relocations of Establishments in Metropolitan Toronto

1. Introduction

Economic change occurs for a variety of reasons. In any geographic area new businesses and establishments[1] are created, relocated, or they may cease to exist. In the latter instance, establishments may go out of business, be consolidated within the geographic area, or they may move to a different location. Given the dramatic economic changes Metropolitan Toronto has experienced since the late 1980's, an analysis of relocations, start-ups, and closures of establishments will provide additional insights into the magnitude of current economic trends.

In the past, there has not been a reliable source of information regarding arrivals, departures and relocations of establishments. The annual employment survey has collected the data for several years, however, the quality of the data has been questionable. Considerable efforts have been made to improve the quality of the data used in this analysis.

This report represents the first detailed analysis conducted on the data. The purpose of this analysis is to determine the usefulness of the information collected; to draw conclusions and identify significant developments regarding start-ups, relocations, and closures of establishments; and to recommend means of improving the monitoring of relocations of establishments in the future.

2. The Arrivals and Departures Database

The arrivals and departures database is derived from a larger body of information contained in the Employment, Land Use and Assessment Databank. This information is gathered from assessment data and during the annual Employment Survey conducted by the Metropolitan Toronto Planning Department Research and Special Studies Division. During 1990, approximately 70 percent of the 82,000 identified work places in Metro were surveyed. The survey identifies establishments that have arrived,

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1 The term "establishment" in this report includes both private and public (government) sector activities. "Establishments" are separate places of work. A company or government department may have several establishments if the places of work are identified separately. It should also be noted that information on individual establishments are collected at the individual occupant level. If the occupant is involved in a significant secondary activity (eg: office and manufacturing) then a second establishment record is created for the additional activity.

departed or moved within Metro by comparing what is currently located at a specific location to what was located there in the previous year.

The arrivals dataset consists of establishments that have **relocated to Metro** from outside {Figure 1.}, **new establishments** created between 1989 and 1990, and those which have **moved within Metro**, either **within** municipalities or **between** municipalities. The departures dataset contains information on establishments that have relocated both **within** and **outside** of Metro and those establishments that have gone **out of business** {Figure 2.}. Some overlap exists between the departures and arrivals datasets in

Figure 1

Arrivals & Moves of Establishments

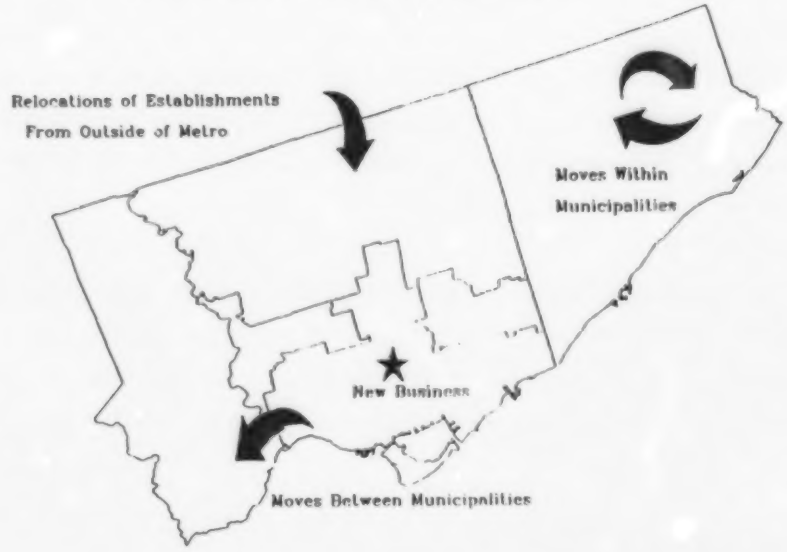


Figure 2

Departures & Moves of Establishments

that establishments which moved between and within Metro municipalities are identified in both datasets. This is because when an establishment moves it is identified as having **departed** from its previous location and **arrived** at its current location.

The **arrivals** dataset was used for the analysis conducted on those establishments which have moved within Metro. The reason for this is that during the course of the survey, respondents are asked (in the case of arrivals) from where the establishment originated (new establishments, relocated to metro, or moved). In the case of departures, respondents are asked where the previous tenant has gone (ie: out of business, relocated out of Metro, or moved within Metro). Very often the current occupant is not able to provide this information, or the unit is currently vacant. Therefore, the arrivals dataset contains a higher quality of data with regard to establishments which have moved than is the case with the departures dataset.

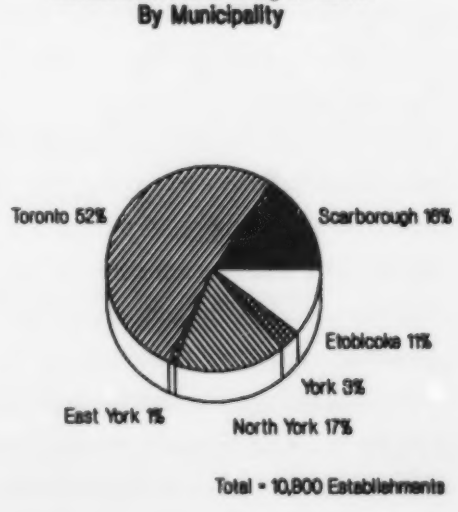
The problem of not being able to determine the new location of the previous tenant also affects the analysis conducted on the out of business component and those which have relocated out of Metro, because a relatively small number of establishments were identified in each of the subsets.

In order to improve data quality a number of manual checks and computer programs were run on the arrivals and departures datasets. These checks eliminated duplicate observations and minor changes in name of the occupant (eg: J. Smith Enterprises versus John Smith Enterprises). Appendix I contains a description of the process used to improve the quality of the data.

2.1 The Arrivals Dataset

The arrivals dataset is comprised of approximately 10,800[2] establishments. The majority of these establishments are located in the City of Toronto. (Figure 3.). Of these: 5,800 were comprised of moves within Metro municipalities; 4,800 were new establishments; 110 moved into Metro from

Figure 3



2 Totals in this report may not add exactly due to rounding. The rounding rules used in this report are as follows. Numbers between 0 and 999 are rounded to the nearest ten and numbers higher than 1000 are rounded to the nearest hundred.

Figure 4

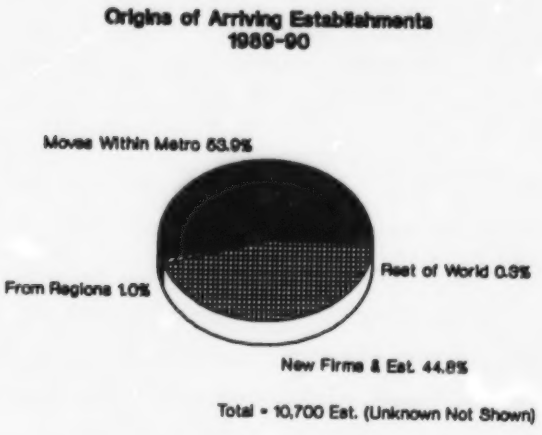
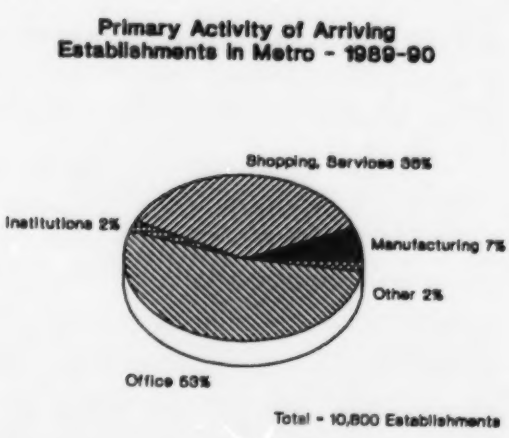

Origins of Arriving Establishments
1989-90
Moves Within Metro 53.9%
From Regions 1.0%
Rest of World 0.9%
New Firms & Est. 44.8%
Total = 10,700 Est. (Unknown Not Shown)

Figure 5



the surrounding regions of Halton, Peel, York, and Durham; 30 moved to Metro from other locations outside of Metro and the 4 Regions; and 100 did not respond to the previous location question. {Figure 4.}.

With regard to sectors of activity[3], 5,700 were Office uses, 3,900 were Shopping, repairs, servicing and rentals, 700 were Manufacturing endeavours, and 230 were Institutional uses. Figure 5. includes an "other" category which is comprised of Terminal, storage, transportation and communications (150 establishments); Entertainment and recreation (60 est.); Residential (20 est.); Resource production and extraction (3 est.).

Arriving establishments represented 77,400 jobs of which a majority were in the Office, Shopping and Manufacturing sectors {Figure 6.}. Office sector jobs were responsible for 45,700 jobs followed by Shopping and Service jobs (18,600), Manufacturing (8,400), Institutions (2,100) and Terminal, storage, transportation and communications (1,500). All other categories combined represented 300 jobs. As Figure 7. illustrates, a

Figure 6 **Employment by Primary Activity of Arriving Establishments in Metro**

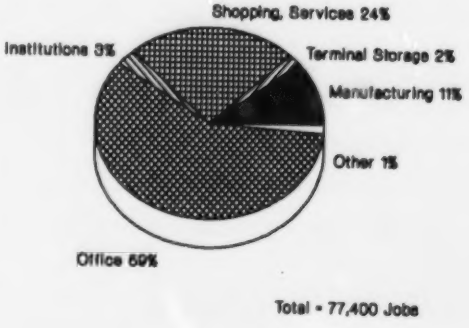
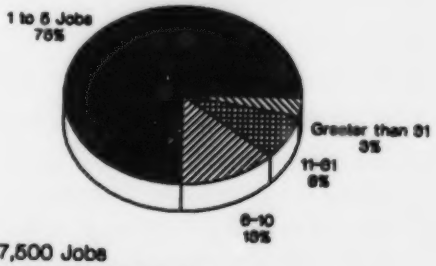


Figure 7.

Arriving Establishments by Employment Range - 1989-90



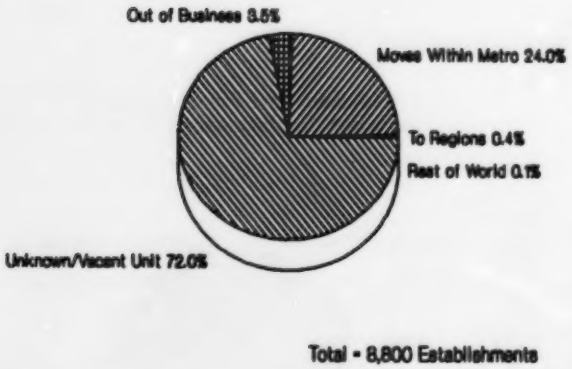
significant majority of arriving establishments are relatively small establishments where one to five employee enterprises constitute seventy-five percent of all arriving establishments.

2.2 The Departures Dataset

The 1990 annual Employment Survey identified 8,800 establishments that departed their previous location. Of the establishments surveyed, 6,400 represented instances where the respondent did not know where the previous tenant had relocated, or the location was vacant at the time of the survey. This represents 72 percent of the departures dataset {Figure 8.}. The remainder of the file is comprised of moves within Metro (2,100 establishments); out of business establishments (300 establishments); relocations to the regions of Peel, Halton, Durham and York (30 establishments); and ten establishments having relocated to other locations in Ontario and beyond. This raises concerns regarding data quality in the departures dataset with regard to being able to conduct economic impact analysis on those establishments which were identified as having gone out of business or having relocated outside of Metropolitan Toronto. When data on **vacant units, no data, unknown new location of previous tenant**, and **moves within Metro** is removed from the analysis, the dataset is comprised of only 340 establishments {Figure 9.}.

Figure 8

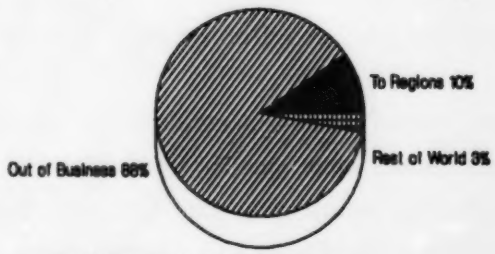
Composition of the Departures Database 1989-90



Total = 8,800 Establishments

Figure 9

Destinations of Departures From Metro 1989-90



Less Vacant Units, New Location Unknown and Moves Within Metro

Total = 340 Establishments

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3. The Arrivals and Departures Database employs a set of Primary Activity Codes which uses a three tiered system of codes to classify the various activities of establishments in Metro. For the sake of brevity, short forms of the categories are often used in this report. A complete list of activity codes is contained in Appendix II.

The analysis of the entire departures dataset does however give an impression of the order of magnitude of the patterns of movement, and cases where going out of business or relocating has occurred. Further analysis of the dataset reveals that a majority of those establishments which were identified as having departed were located in the City of Toronto (5,700 establishments).{Figure 10.}. This is most probably demonstrative of the level of economic activity occurring in the six Metro municipalities.

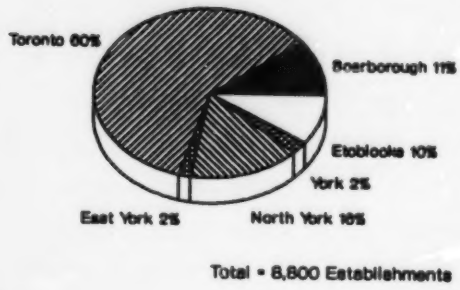
Office uses constituted 51 percent (4,500 establishments) of those establishments captured in the departures dataset {Figure 11.}. Shopping and services represented 3,000 establishments, followed by Manufacturing at 1,000 establishments. All establishments in other categories were comprised of 260 establishments, representing two percent of the entire departures dataset.

In terms of total employment captured in the departures dataset, Office activities represent fifty eight percent of employment (51,800 jobs){Figure 12.}, followed by: Manufacturing at 17,100 jobs; Shopping and services (16,800 jobs); Terminal and storage (2,100 jobs); and all other categories at 540 jobs.

A majority of establishments identified in the departures dataset were smaller firms of one to five employees, representing sixty-nine percent of the establishments {Figure 13.}. Establishments having six to ten employees ranked second, followed consecutively by establishments with higher numbers of employees.

Figure 10

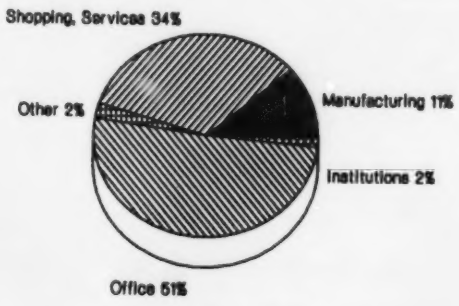
Establishments Departing From Metro By Municipality - 1989-90



Total = 8,800 Establishments

Figure 11

Primary Activity of Departures From Metro - 1989-90



Total = 8,800 Establishments

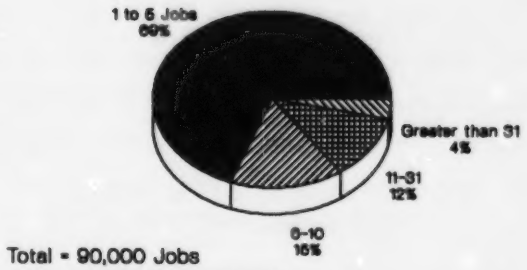
Figure 12

Employment and Primary Activity of Departing Establishments From Metro

Total = 80,000 Jobs

Figure 13

Departing Establishments
By Employment Range - 1989-90



Total = 90,000 Jobs
Total = 8,800 Establishments

Figure 14

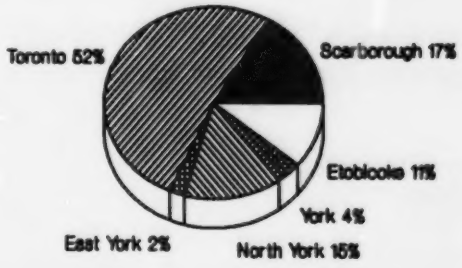
3. *Arrivals of Establishments*

The following sections discuss the economic change resulting from the new establishments component of the arrivals dataset, and establishments which have relocated to Metropolitan Toronto from outside Metro. It should be noted that 97% of these two subsets combined consist of those establishments identified as new establishments. Therefore, an analysis of the economic change resulting from the combination of these two arrivals subsets has not been conducted.

3.1 New Establishments - Startups

There were 4,800 establishments identified as being new enterprises. This represents 44.8 % of establishments identified as arrivals. A substantial majority of these new establishments opened in the City of Toronto {Figure 14.}. Figure 15. indicates that new establishments were distributed fairly evenly within municipalities with the exception of a tight cluster along Queen Street running west of Yonge Street, and north along Yonge and Bay Streets to Bloor Street.

Location of New Establishments
in Metro - 1989-90



Total = 4,800 Establishments

New Establishments in Metro
1989-90

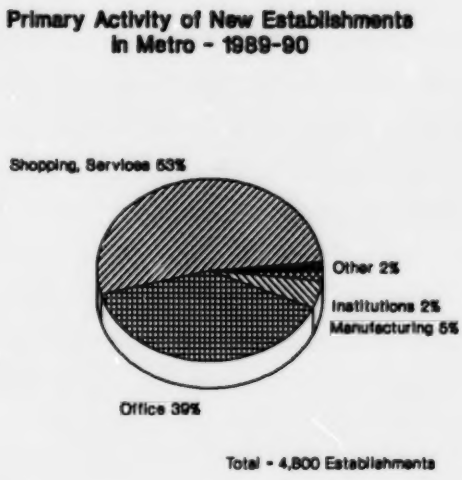
Figure 15.

Legend

1 Dot = 1 Establishment

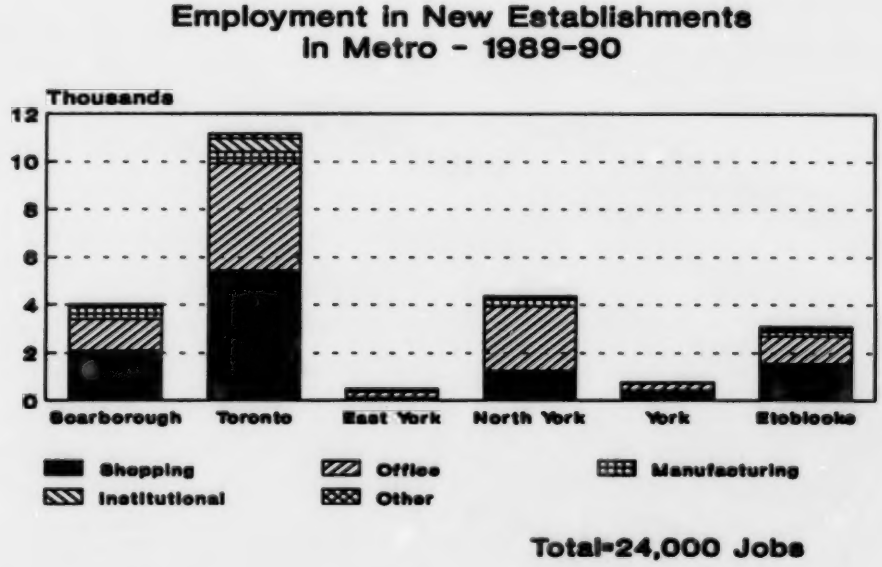
Shopping, services, repairs, servicing and rentals constituted 2,500 new establishments, representing 53% of all establishments identified as new enterprises (Figure 16.). Office activities were the second most frequent with 1,900 establishments, followed by 230 Manufacturing establishments, 90 Institutions and a combined 80 Residential, Resource Extraction, and Entertainment oriented establishments.

Figure 16



New establishments provided 24,000 jobs to the Metro economy between 1989 and 1990. The City of Toronto captured a majority of this new employment at 11,200 jobs. North York acquired 4,300 new jobs, followed by Scarborough (4,000), Etobicoke (3,100), York (760) and East York (480). Shopping, services, repairs, servicing and rentals represented 46 percent of all employment generated by new establishments followed by Office uses (42%), Manufacturing (6%), Institutions (3%) and all other categories (2%). Figure 17. illustrates the dominance of the Shopping and Office categories and the geographic distribution of employment in new establishments.

Figure 17

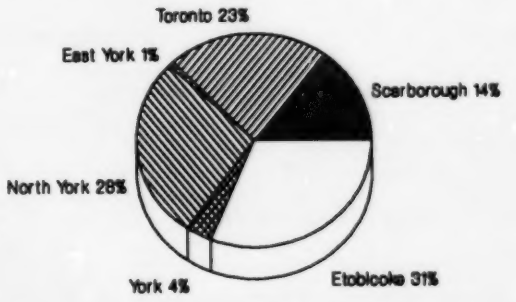


3.2 Relocations to Metro

Attracting new establishments from outside an urban area is of prime importance to those concerned with economic development in any urban area. From the analysis conducted on the arrivals dataset, only 140 establishments were identified as having relocated to Metropolitan Toronto during 1990, representing a total of 1,800 jobs. Of these establishments, a majority relocated to Etobicoke, followed closely by North York. A lesser number relocated to Toronto and Scarborough, while York and East York combined attracted five percent of relocating establishments {Figure 18.}. A significant majority of establishments which relocated to Metro originated in the Regions of Peel and York, representing 38 and 30 percent of relocations respectively {Figure 19.}. The rest of Ontario and Canada constituted 20 percent of relocating establishments, followed by Durham Region, Halton Region, and all countries outside of Canada.

Figure 18

Location of Establishments Relocating to Metro Municipalities 1989-90

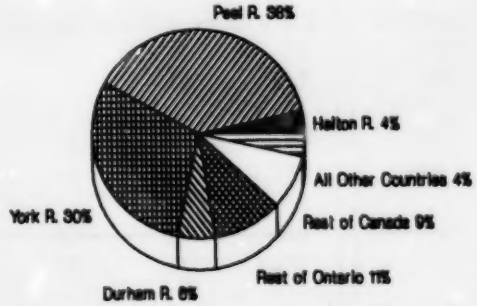


Total = 140 Firms & Establishments

A majority of those establishments which relocated to Metropolitan Toronto are involved in Office activities followed by: Shopping, services, repairs, servicing and rentals; Manufacturing; Terminal, storage and transportation and communications. {Figure 20.} Office activities also predominate in terms of employment gained as a result of relocations to Metro. Of the office establishments moving to Metro, a significant number of office employment located in Etobicoke (700 jobs), followed by North York (380 jobs), Toronto (60) Scarborough (30), and York (10) {Figure 21.}.

Figure 19

Origins of Establishments Relocating to Metro - 1989-90



Total = 140 Establishments

Figure 20

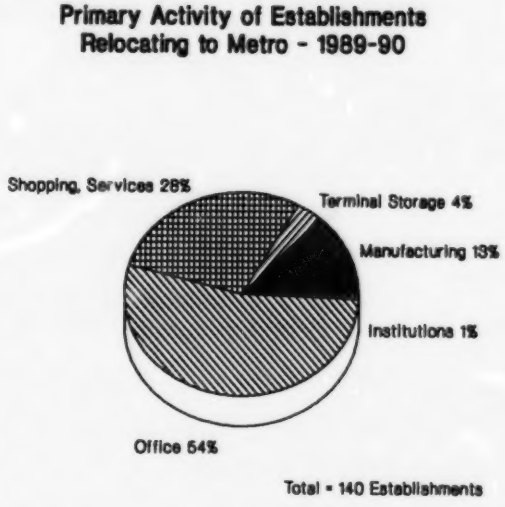
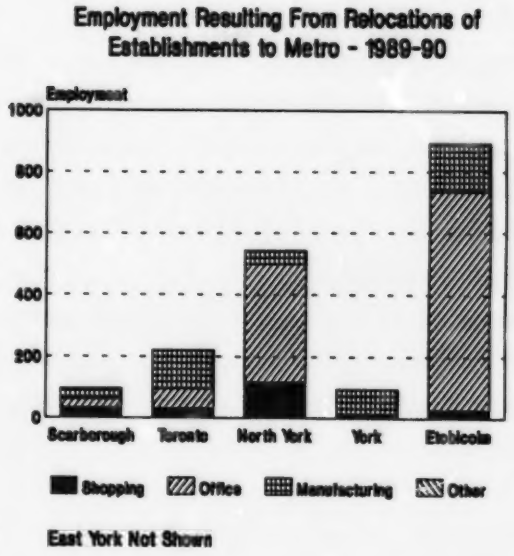


Figure 21



4. Moves Within Metro

Moves **within and between** individual Metro municipalities represent 54 percent of all establishments defined as having arrived. Moves within the same city block or the same building would have little impact on the economy as a whole, and are therefore not within the scope of this report, nor are such moves included in the arrivals dataset..

What is of interest to this study is those establishments which have relocated to **another** municipality in Metro. What is striking about this portion of the arrivals dataset is the relative size of moves within a muncipality as compared to moves between municipalities of Metro. A total of 435 establishments[4] were identified as having moved from one municipality to another as compared to 5,324 establishments which moved **within their own municipality**. This comparison is significant as it demonstrates an evident tendency of owners and managers to stay within their known market..

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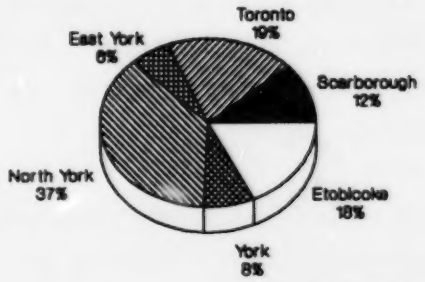
4. Numbers presented in this section are <u>not</u> rounded due to the high quality of the data and the small number of establishments involved.

Figure 22

Destinations of Moves Between Metro Municipalities - 1989-90



With the exception of the City of Toronto, all Metro municipalities gained from moves between municipalities (Table 2.). North York had the largest net gain of establishments and employment from inter-municipal moves, gaining 1,260 jobs in 95 establishments. Etobicoke had a net gain of 885 jobs and 58 establishments. Most of the establishments which moved to North York or Etobicoke originated in Toronto.

Table 1. Movement Between Metro Municipalities Establishments and Employment

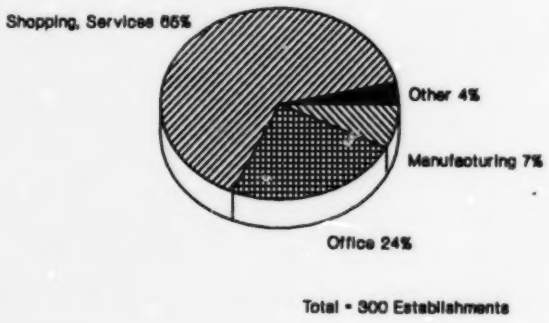
DESTINATION	POINT OF ORIGIN SC	TO	EY	NY	YK	ET	Total	Net Change
Scarborough								
Establishments	-	42	2	4	2	1	51	1
Employment	-	341	4	16	36	2	399	39
Toronto								
Establishments	21	-	7	40	5	11	84	*(170)*
Employment	208	-	17	188	19	91	523	*(2,440)*
East York								
Establishments	4	17	-	1	4	0	26	11
Employment	19	249	-	5	23	0	296	264
North York								
Establishments	21	*117*	4	-	14	6	162	*95*
Employment	147	*1,342*	7	-	76	61	1,633	*1,260*
York								
Establishments	1	23	2	4	-	3	33	5
Employment	5	277	4	32	-	12	330	70
Etobicoke								
Establishments	3	*55*	0	18	3	-	79	*58*
Employment	59	*754*	0	132	106	-	1,051	*885*
TOTAL								
Establishments	50	*254*	15	67	28	21	435	
Employment	438	*2,963*	32	373	260	166	4,232	

5. *Departures of Establishments*

The following section will discuss establishments identified as having gone out of business, establishments which have relocated to outside of Metro, and the economic impact of these two categories combined. It should be noted that the destination of departures is poorly documented in the database because the current tenant at a location very often does not know whether the previous tenant had moved or gone out of business.

Figure 23

Primary Activity of Out of Business Establishments in Metro - 1989-90



During the 1990 employment survey, a total of 300 establishments, or 12 % of departures with known destinations, were identified as having gone out of business, representing a total of 2,200 jobs. An analysis of the activity of those establishments identified as having gone out of business reveals that a significant majority of these establishments were involved in Shopping, services, repairs and rentals {Figure 23.} followed by Office, Manufacturing , and Other (Terminal, storage, transportation and communications and Entertainment-recreation). Further, Shopping, service, repairs, and rental establishments were consistently in the 55 to 70 percent range for all that were identified as having gone out of business in each of the municipalities, with the exception of York, where this category represented 100 percent. A more detailed analysis of the Shopping-services category reveals that a significant proportion of these establishments were involved in retail shopping (52%) and personal services activities (25%).

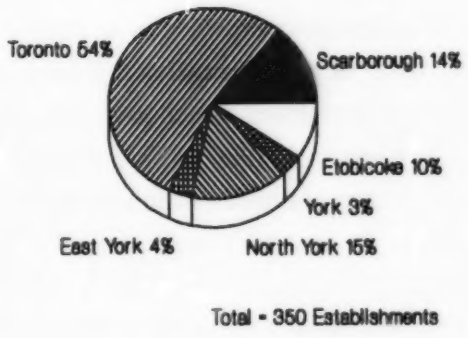
Office employment accounted for forty percent of decreases in employment (900 jobs), followed by: Shopping and services (820 jobs); Manufacturing (440 jobs); Terminal, storage, transportation and communications(40 jobs). Entertainment and recreation, and Institutions lost a combined total of 40 jobs.

Forty-four establishments were identified as having relocated outside of Metro, representing a total of 500 jobs. The extremely small size of this subset, and the degree to which it may be an underestimation, hinders any form of activity analysis.

The combination of establishments which have **gone out of business** and those which have **relocated out of Metro** (referred to as ***economic departures*** in this section) represented 350 establishments and 2,700 jobs. Of these establishments, 54 percent were located in the City of Toronto, representing 190 establishments and 1,500 jobs (Figure 24.). Fifty of the establishments were located in Scarborough, representing a 400 jobs decrease. Fifteen percent of the establishments were located in North York constituting 55 establishments and 510 jobs. Etobicoke was the previous location for 10 percent of the establishments identified as being economic departures, having lost 35 establishments and 280 jobs. York lost an identified 36 jobs in 12 establishments, and East York lost 50 jobs in 10 establishments.

Figure 24

Economic Departures - by Municipality



Total - 350 Establishments

Of the establishments identified in this subset, 57 percent were in the Shopping, services, repairs and rentals category (900 jobs), 29 percent were defined as Office establishments (1,100 jobs), and 9 percent were Manufacturing establishments representing 590 jobs (Table 2).

Establishments which were categorised as Office uses lost 1,100 jobs in 100 establishments, representing 29 percent of establishments and 41 percent of employment (Table 2.). Over one half of the establishments identified in the economic departures group were Shopping, service, repairs servicing and rental enterprises, representing 33 percent of employment contained in this group.

Table 2. Economic Departures
Establishments and Employment by
Primary Activity

	Establishments	%	Employment	%
Shopping, Services	200	57	900	33
Office	100	29	1,100	41
Manufacturing	30	9	590	22
Terminal, Storage	10	3	120	4
Other	10	3	70	3
TOTAL	350	100	2,700	100

Note: Totals may not add exactly due to rounding

6. *Recommendations for Further Analysis*

In addition to relocations of establishments, start-ups, and closures of establishments, economic changes also occur as a result of down-sizing or expansion of existing establishments. Economic change can also result from alterations in the mix of products or services produced or provided by an establishment. These types of economic changes have not been addressed in this analysis. It would be possible to define criteria and extract a listing of those establishments which have down-sized or expanded from the Employment, Land Use and Assessment files. In order to obtain a more comprehensive analysis of economic change, it is recommended that an analysis of down-sizing and expansion of establishments be included in the analysis in the future.

Additional work could be done on the departures dataset so that it is more representative of economic departures. Where a departure is also listed as an arrival, it could be eliminated from the departures dataset. The preliminary list of economic departures could be sent to the area municipal economic development departments to add missing information on the destinations of departures.

An additional issue that was not addressed in this analysis is **why** establishments that have relocated outside of Metro have chosen to do so. This analysis is, unfortunately, beyond the scope of the annual Employment Survey as establishments which have relocated outside of Metro are not surveyed. It may be possible to obtain information from agencies such as Bell Canada, or Canada Post to identify the new locations of those establishments which have moved out of Metro. With this information, Metro Economic Development Department or the area municipalities may be able to do a more in-depth analysis as to why establishments are moving out.

This report has identified a number of factors regarding the arrival, departure, and relocations of establishments in Metropolitan Toronto. It is recommended that future analysis of these activities trends be monitored on an annual basis so as to identify, analyze, and implement strategies to address future trends in the economy.

Appendix I - Data Checks - Processes for Improving the Quality of the Data

Data Checks - Processes for Improving the Quality of the Data

A number of manual and programming checks were run on the arrivals and departures files to ensure a higher quality of information. This appendix will not describe in great detail the various components of the programs, but rather, will describe the underlying logic of the process and the types of anomalies removed from the original datasets.

Programs were developed which check individual establishments in the arrivals file against the previous year's Employment Survey data at the occupant level to determine if the firm was actually at the location in the previous year. This procedure compensates for the **reassignment of occupant numbers** (in the Provincial Assessment Process) and any coding errors which may have occurred in the Employment Survey Process. The programs also print a list of all arrivals by municipality and Planning Geographic Unit (PGU) to the block level and a corresponding list of all other firms located on the individual blocks. These two lists were compared manually in order to identify **firms which may have changed their names** (ie: Simpsons to Hudsons Bay) or **changes in the way in which the occupant name has be entered into the system** (ie: Geo. Renolds Co. VS G. Renolds Co.). After checking the arrivals list against the other firms on the block list the observations which represent duplicates were removed from the dataset. Other programs were developed which eliminated **vacant properties** and those records which had a **total employment of zero** thereby eliminating parks, and rights of ways (etc).

The arrivals dataset, departures dataset, and a dataset of all establishments removed in the manual check process were then compared to identify all firms and establishments at the exact same location that have the identical primary activity codes. This deleted **establishments which had sold** and again, those which had **changed the name of the establishment**.

Finally, the new business component of the arrivals file were checked against the previous years' original Employment Survey Sheets[1] for accuracy. Any discrepancies were again deleted from the arrivals dataset.

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1 Employment Survey Sheets refers to the printed list of establishments which the surveyor refers to and updates when conducting the on foot survey of places of work in Metro.

Appendix II - Listing of Primary Activity Codes

ACTIVITY CODE (OCCUPANCY BASIS)

0 NO PERCEIVED ACTIVITY

00,09	No Perceived Activity

1 RESIDENTIAL

11, 12	Private Residential
15	Collective Residential

2 RESOURCE PRODUCTION

21	Farming - Livestock
22	Farming - Crops
23	Farming - Mixed & Specialty
24	Forestry
25	Fish & Wildlife Production
29	Other

3 RESOURCE EXTRACTION

31	Shaft Mining
32	Pumping
33	Surface Mining & Quarrying

4 MANUFACTURING

41	Energy Production
42	Raw Material Processing
43	Processed Goods Processing
44	Product Assembly
45	Waste Treatment
46	Research and Development (Laboratories)
47	Printing, Reproduction and Data Processing
49	On Site Construction/Renovation/Maintenance

5 TERMINAL, STORAGE AND TRANSPORTATION AND COMMUNICATIONS

51	Terminal and Dispatch
52	Storage
53	Warehousing
55	Transportation Movement (Rights-of-Way)
56	Communication and Energy Conductor System (Rights-of-Way)

6 SHOPPING, SERVICES, REPAIRS, SERVICING AND RENTALS

61	Retail Shopping
62	Retail Shopping Continued
63	Food Retail Shopping
64	Repairing, Cleaning and Servicing Consumer

		Commodities
	65	Personal Services
	66	Business Plant and Equipment Sales and Servicing
	67	Rental Services
	68	Accommodation Services
	69	Retail Non-Public (Wholesaling)
7	OFFICE	
	71	Mining, Manufacturing, Transportation, Utilities, Construction and Resource Production
	72	Finance, Insurance and Real Estate
	73	Business Services
	74	Technical Services
	75	Communication and Media
	76	Trade and Personal Services
	77	Health Service Offices
	78	Government
	79	Associations, Other and Ancillary Office Activities
8	INSTITUTIONS	
	81	Educational, Public
	82	Educational, Private (Separate)
	83	Health Service Institutions
	84	Religious
	85	Protective and Custodial
	86	Other Institutions
9	ENTERTAINMENT AND RECREATION	
	91	Outdoor Entertainment (Passive)
	92	Outdoor Sporting Recreation (Active)
	93	Indoor Entertainment (Passive)
	94	Indoor Sporting Recreation (Active)

ACTIVITY CODE (OCCUPANCY BASIS)

0 NO PERCEIVED ACTIVITY

00	No Perceived Activity
000	No Perceived Activity on Body of Water
010	No Perceived Activity on Residential Parcel
020	No Perceived Activity on Resource Production Parcels or Occupancies
030	No Perceived Activity on Resource Extraction Parcels or Occupancies
040	No Perceived Activity on Manufacturing Parcels or Occupancies
050	No Perceived Activity on Terminal, Storage, Transportation and Communication Parcels or Occupancies
060	No Perceived Activity on Shopping, Services, Repairs,Servicing and Rental Parcels or Occupancies
070	No Perceived Activity on Office Parcels or Occupancies
080	No Perceived Activity on Institutional Parcels or Occupancies
090	No Perceived Activity on Recreational Parcels or Occupancies

1 RESIDENTIAL

11,12	Private Residential
111	Single Detached
112	Single Detached Conversion
113	Semi-Detached
114	Semi-Detached Conversion
115	Duplex
116	Duplex Conversion
117	Triplex, Other Plex
118	Triplex and Other Plex Conversions
119	Other Individually Attached such as - Townhouse, Row House, Maisonette, Quadrufoil, Stacked Rowhouse
121	Other Individually Attached Conversions
122	Apartment
123	Apartment Conversion
124	Mobile Homes
125	Others such as Residential Accessory and Flats
126	Other Conversions
127	Seasonal Residences (Cottages)
128	Residential Ancillary (open space, pools, lockers, washrooms)

15	Collective Residential
151	Boarding and Rooming Houses
152	YMCA, YWCA, Youth Hostels, Salvation Army Hostels, Emergency Accommodation, etc.
153	Hospital Residences
154	Sorority & Fraternity Houses, University Residences
155	Monasteries, Convents, Religious Retreats
156	Homes for the Aged, Sanatoriums, Orphanages, Children's Homes
157	All-Season Camps, Mobile Home Parks, Horse Riding Schools, Several Residences on one property, e.g. Condominium Chalet Development Lodges
158	Military Barracks
159	Other & Collective Ancillary (open space, pools, lockers, washrooms, etc.)

2 RESOURCE PRODUCTION

21	Farming - Livestock
211	Cattle - Beef (feed lots)
212	Cattle - Dairy
213	Pigs
214	Sheep & Goats
215	Poultry
216	Horses
217	Mixed Livestock
218	Animal Shelter (Stockyards)
219	Other Livestock
22	Farming - Crops
221	Tree Crops (Fruits)
222	Vine Crops (Fruits)
223	Vegetables
224	Wheat
225	Grains (Other than Wheat)
226	Tobacco
227	Flowers
228	Mixed Crops
229	Other Crops

23	Farming - Mixed & Specialty
231	Mixed Livestock & Crops
232	Breeding - (Horses, Dogs, Fur-bearing Animals)
233	Sod Farms
234	Tree Farm (Christmas, Sugar Bush)
235	Greenhouses - (Flowers, Mushrooms, etc.)
236	Bee-Honey Production
237	Marine
238	Fallow or Abandoned
239	Other Specialty
24	Forestry
241	Logging
242	Tree Production
243	Field Nursery
249	Other
25	Fish & Wildlife Production
251	Fish Hatcheries
252	Fish Runs & Ladders
253	Wildlife Breeding Stations
254	Wildlife Runs & Crossings
255	Wildlife Habitats
256	Trap Lines
259	Other
3	RESOURCE EXTRACTION
31	Shaft Mining
311	Metallic ore Extraction
312	Non-metallic Ore Extraction
313	Fossil Fuel Extraction
32	Pumping
321	Water
322	Gaseous Fossil Fuel
323	Liquid Fossil Fuel
324	Soluble Mineral
33	Surface Mining & Quarrying
331	Metallic Ore Extraction
332	Fossil Fuel Extraction
333	Rock, Sand and Gravel Extraction
334	Shale and Clay Extraction
335	Marl Extraction (any loose, earthy, crumbly deposit)

336	Other Non-metallic Bedrock Extraction
337	Peat Extraction
338	Earth Fill

4 MANUFACTURING

41	Energy Production
411	Wind Propelled
412	Solar
413	Hydro Electric
414	Fossil Fuel
415	Nuclear
416	Other
42	Raw Material Processing
421	Water Purification and Ice Manufacturing
422	Food Processing (Abattoir, Meat Packing, Brewery, Mills, Cannery, Dairy)
423	Natural Fibres, Rubber & Pelt Processing (Sawmills, Paper Mills, Tannery, Furrier)
424	Rock, Stone and Non-metallic Processing
425	Clay and Fine Aggregate Processing (Glass, Ceramics, Brick, Block, Cement)
426	Ore Processing (Ingots, Castings and Structural Forms)
427	Oil, Natural Gas and Coat Processing and Refining
428	Chemical Processing (Acids, Alkalis, Gases, Salts)
429	Other (Tobacco, Fish Oil)
43	Processed Goods Processing
431	Food (Bakery, Packaged Goods)
432	Textiles, Leather and Rubber
433	Paper and Wood Products
434	Component Parts, Artificial Products, Recreational Equipment, Notions, Toys, Novelties, Miscellaneous Educational Supplies, Jewellery
435	Metal and Metal Products
436	Oil, Natural Gas & Coal Byproducts (Varsol, Benzene, Acetylene, Resin)
437	Chemical Products (Plastics, Paints, Medicines)
438	Other Non-metallic Products (Concrete Batching, Asphalt)
439	Other including Finishing and Treatment Processes
44	Product Assembly
441	Clothing
442	Furniture and Fixtures
443	Building Components and Containers (Includes

companies that install Aluminum Siding, Eavestroughing, Storm Doors and Windows)

444 Scientific Equipment and Precision Instruments

445 Machinery and Mechanical Equipment, Tools and Hardware

446 Electrical and General Equipment, including Household Appliances

447 Armaments, Munitions and Explosives

448 Vehicles and Vehicular Products (Aircraft, Automobiles, Trains, Tractors, Trailers)

449 Other including Genera. Workshop (Includes Companies that Manufacture Advertising Signs, i.e. Billboards)

45 Waste Treatment

451 Transfer Station

452 Sanitary Land Fill Site

453 Waste Processing Plant (including recycling, processing and treatment)

454 Water Pollution Control Plant

455 Sewage - Sludge Treatment Plant

456 Hazardous Substances

457 Garbage Dump

459 Other

46 Research and Development (Laboratories)

461 Raw Material Development and Testing

462 Processed Products Development & Testing

463 Chemical & Biological Development & Testing

469 Other

47 Printing, Reproduction, Data Processing and Sorting

471 Printing

472 Reproductions (Tapes, Film, Records)

473 Data Processing (Tapes, Ribbons, Disks)

474 Binding

475 Other

476 Sorting Mail, etc.(Post Office Sorting Plant)

49 On Site Construction/Renovation/Maintenance

491 Residential

492 Resource Production

493 Resource Extraction

494 Manufacturing Plants

495 Terminal, Storage, Transportation & Communications

496 Shopping & Services

497 Offices

498 Institutions

499 Recreational & Entertainment

5 TERMINAL, STORAGE AND TRANSPORTATION AND COMMUNICATIONS

51 Terminal and Dispatch

511 Bus Terminal
512 Rail and Transit Terminals
513 Dock, Wharf, Ship Terminals
514 Airport (Passenger & Freight Terminals)
515 Broadcasting & Communication
516 Power Transmission & Control Station
517 Pipeline Pumping and Control Station
518 Trucking Terminal
519 Other (including Taxi Dispatch)

52 Storage

521 Open Air Storage
523 Reservoir, Silo and Tank Storage
524 Hangars
525 Open Air Parking
526 Parking Garage
527 Scrap Yards
528 Mineral Aggregate Storage (Wayside Pits)
529 Other

53 Warehousing

530 General or Mixed Warehouse
531 Warehouse Providing Rental Storage
532 Warehouse for Foods and Other Resource Production Goods
533 Warehouse for Resource Extraction Goods
534 Warehouse for Chemical Products
535 Warehouse for Electrical, Electronic and Scientific Products,Jewellery, Notions, Novelties and Recreational Goods
536 Warehouse for Textiles, Leather and Rubber Products
537 Warehouse for Metals, Machinery and Equipment
538 Warehouse for Paper, Wood and Office Products
539 Warehouse for Masonry and Ceramic Products

55 Transportation Movement (Rights-of-Way)

551 Road Traffic
552 Railway and Transit Traffic on own Right-of-Way
553 Air Traffic (Along reserved runway approaches)
554 Water Traffic (Through portages and canals)
555 Pipeline Transportation
556 Pedestrian Traffic
559 Other

56 Communication and Energy Conductor System (Rights-of-Way)

561 Power Transmission System
562 Telegraph System
563 Telephone and Cable Systems
569 Other

6 SHOPPING, SERVICES, REPAIRS, SERVICING AND RENTALS

61 Retail Shopping

611 Pharmacies and Drug Stores
612 Clothing Retailing
613 Shoe Retailing
614 Furniture, Carpet and Electrical Appliance Retailing (Stereo,TV, Video)(Radio Shack)
615 Hardware (Canadian Tire)
616 Vehicle Products and Parts (Sales and Showrooms)
617 Variety Store Retailing
618 Department Store Retailing
619 Catalogue Stores

62 Retail Shopping Continued

621 Watch, Jewellery, Cameras and Records
622 Sporting Goods and Toys
623 Newspapers, Periodicals, Book, Stationery, and Office Supplies
624 Other Speciality Stores (Drapery, Florists, Stamps, Ticket & Film Booths, Antique Shops and Commercial Art Galleries)---
625 Flower, Vegetable and Tree Nursery Outlets
626 Lumber Yards
628 Bulk Retail (Oil Supplies, etc.)
629 Other and Retail Ancillary (Open Space, Lockers, Washrooms, Pinball/Video Arcades without Employment, etc.)---

63 Food Retail Shopping,

631 Supermarkets (e.g. Dominion, Loblaws)
632 Convenience Food Outlets (e.g. Beckers, Mac's Milk, 7-Eleven)---
633 Speciality Food Stores (Bake Shop, Butcher, Health Foods)
634 Liquor, Beer and Wine Retailing
635 Food and Department Store (Miracle Mart) (50-50 Split)
639 Other

64	Repairing, Cleaning and Servicing Consumer Commodities
641	Clothing and Textiles (Shoes)
642	Furniture, Hardware and Household Appliances
543	Automobile Service and Repair (Gas Station & Car Wash)
644	Automobile Special (Body, Muffler & Transmission Shops, etc.)
646	Welding & Blacksmiths Shop
649	Other
65	Personal Services
651	Restaurant and Tavern (The Keg, Golden Griddle, etc.)
652	Lounge and Bar
653	Drive-in Restaurant (A & W, etc.)
654	Other Fast Food Outlets (McDonald's, Harvey's, etc.)
655	Cosmetic (Beauty Salon and Barber Shop)
656	Refreshment and Entertainment
657	Burials and Cremations (Cemeteries, Funeral Homes, Crematorium)
658	Animal Boarding Service and Treatment
659	Other (Massage, Palm Reading, Psychic Reading)
66	Business Plant and Equipment Sales and Servicing
661	Sales and Servicing Equipment
662	General Maintenance
663	Heavy Vehicular Equipment Servicing (Trains, Trucks, Trailers, Tractors)
664	Signs (Hoarding and Advertising, e.g. Mediacom Signs)-for an establishment that manufactures signs, use Activity Code 449 as no employment permitted for this Activity Code)---
669	Other
67	Rental Services
671	Clothing and Textiles
672	Tools and Light Equipment
673	Vehicle
674	Heavy Equipment
675	Recreational Equipment
676	Video
679	Other
68	Accommodation Services
681	Tourist Homes
682	Tourist Cabins

	683	Motels
	684	Motor Hotels
	685	Hotels
	686	Seasonal Collective Residence e.g. Summer Camps, Winter Camps, Hockey Schools, R.V. (trailer) Campgrounds, Several Residences on one property (ski-chalet development), Lodges
	689	Other Accommodations
	69	Retail Non Public (Wholesaling)
	690	Retail Wholesaling of General or Mixed Goods
	692	Retail Wholesaling of Food and Other Resource Production Goods
	693	Retail Wholesaling of Resource Extraction Goods
	694	Retail Wholesaling of Chemical Products
	695	Retail Wholesaling of Electrical, Electronic and Scientific Products, Recreation Equipment, Notions, Toys, Novelties,Miscellaneous Educational Supplies, Jewellery
	696	Retail Wholesaling of Textiles, Leather and Rubber Products
	697	Retail Wholesaling of Metal Machinery and Equipment
	698	Retail Wholesaling of Paper, Wood and Office Products
	699	Retail Wholesaling of Masonry and Ceramic Products
7	OFFICE	
	71	Mining, Manufacturing, Transportation, Utilities, Construction and Resource Production
	711	Mining and Mineral Exploration
	712	Integrated Oil Companies
	713	Manufacturing
	714	Transportation Operations (Airlines, Railways, Bus and Trucking Companies, etc.)
	715	Travel Agencies, Airline Reservations
	716	Other Transportation (Shipping and Forwarding Agencies, Brokers, etc.)
	717	Utilities (Bell Canada)
	718	Construction (Predominantly Office Workers)
	719	Resource Production (Farming, Fishing, and Forestry)
	72	Finance, Insurance and Real Estate
	721	Bank and Trust Company Branches
	722	Banks and Trust Companies: Administrative Offices
	723	Investment Services (Investment Dealers, Mutual Funds, Exchanges and Exchange Services)
	724	Financing (Consumer and Business Finance, Consumer

	Loans, Business Finance, Mortgage Brokers)
725	Insurance Companies (Life Insurance, General Insurance, Mixed - Life and General)
726	Other Insurance (Insurance Agencies and Insurance Adjusters)
727	Real Estate Developers
728	Real Estate Agents (Brokers)
729	Miscellaneous (include Instant Teller on its own, i.e. not located in conjunction with a Bank)---
73	Business Services
731	Law Firms
732	Accountants
733	Management Consultants (Placement Services, Actuarial Services, Market Research, Other Research)
734	Advertising Agencies
735	Public Relations Consultants
736	Photographers and Graphic Artists
737	Personnel Services (including Theatrical Agencies)
738	Computer Services (Computer Programming, Computer Consulting, Other EDP Related Offices)
739	Other Business Services (Investigation Services, Real Estate Management, Janitorial Services, Maintenance, Other and Not Specified Business Services)
74	Technical Services
741	Architects and Town Planners (including Landscape Architects)
742	Engineering Consultants (Diversified Engineering, Construction Engineering, Industrial Engineering, Mining Services, Other Engineers)
743	Industrial Designers
749	Other Technical Services (including Interior Designers)
75	Communication and Media
751	Radio and TV Stations
752	Program Producers
753	Program and Film Distributors
754	Film and Recording Studios
755	Book Publishers
756	Periodical Publishers
757	Newspaper Publishers
758	Other Radio, TV, Motion Picture and Publishing

76	Trade and Personal Services
761	Retail Trade Administration (Sales Representative)
762	Wholesale Trade (Import and Export) Administration (Manufacturer's Agent)
763	Accommodation, Entertainment and Food Services
764	Other Personal Services
769	Other Trade
77	Health Service Offices
771	Doctors and Physicians
772	Dentists
773	Opticians and Optometrists
774	Other Health Service Practitioners (Chiropractors, Physiotherapists)
775	Laboratories and other related services, Radiologists, etc.
78	Government
781	Federal
782	Post Offices
783	Provincial
784	Regional or County
785	Local Municipal
786	Foreign (Embassies, Consulates, Trade Commissioners, etc.)
787	Education
79	Associations, Other and Ancillary Office Activities
791	General Civic Associations
792	Business Associations
793	Professional Associations
794	Labour Associations, Trade Unions
795	Religious Organizations and Associations
796	Miscellaneous Associations
797	Other Offices Not Classified Elsewhere
799	Office Ancillary (Open Space, Lockers, Washrooms, etc.)

8 INSTITUTIONS

81	Educational, Public
811	Nursery, Kindergarten or Day Care Centres
812	Elementary Schools
813	Junior High Schools
814	Secondary Schools
815	Community Colleges
816	Universities and Polytechnics (Ontario College of Art)

817 Other Public Educational Establishments

82 Educational, Private (Separate)

821 Nursery, Kindergarten or Day Care Centres
822 Elementary Schools
823 Junior High Schools
824 Secondary Schools
825 Colleges
826 Schools of Art and the Performing Arts
827 Skill-Oriented Educational Establishments (Driving Schools, Karate, etc.)
829 other Private Educational Establishments

83 Health Service Institutions

831 Hospitals
832 Clinics and Community Health Services
834 Ambulance Stations
839 Other Health Service Institutions

84 Religious

841 Places of Worship

85 Protective and Custodial

851 Police Stations
852 Fire Halls
853 Gaols and Penitentiaries

86 Other Institutions

861 Legislative (Parliament and Houses of Legislative Assembly)
862 Courts of Law
863 Libraries and Archives
869 Institutions Not Elsewhere Specified

9 ENTERTAINMENT AND RECREATION

91 Outdoor Entertainment (Passive)

911 Natural and Historical Sites
912 Botanical Garden
913 Zoological Garden
914 Aquatic Garden, Aquarium
915 Drive-in Cinema
916 Fairground, Amusement Park, Circus

917	Race Tracks (Horses, Dogs)
918	Outdoor Sports Stadiums
919	Other
92	Outdoor Sporting Recreation (Active)
921	Swimming and Bathing Beach
922	Camping and Picnicking
923	Open Water Activities (Boating, Fishing, Skiing)
924	Parks and Open Areas (Hunting, Walking, Hiking, Horseback Riding, Cycling)
925	Open Area Winter Sports (Skiing, Downhill and Cross-country, Snowmobiling, Snowshoeing)
926	Golf Courses and Driving Ranges
927	Courts (Tennis, Lawnbowling, etc.)
928	Field Game Activity (Football, Baseball, etc.)
929	Other
93	Indoor Entertainment (Passive)
931	Theatre
932	Concert Hall
933	Cinema
934	Art Gallery, Museum
935	Exhibition Hall (Convention Centre)---
936	Planetarium
937	Indoor Stadiums and Arenas
939	Other, Indoor Entertainment Ancillary
94	Indoor Sporting and Recreation (Active)
941	Community Stadiums, Arenas and Recreation Centres
942	Gymnasium, Ice & Roller Skating Rink
943	Bowling Alley, Curling Rink
944	Billiards, Pool Hall, Amusement Arcades
945	Swimming Pool
946	Multi-purpose Clubs & Halls (Banquet, Dance, Boulevard Club)
947	Exercise Facility (Vic Tanny's)
949	Other, Indoor Sporting Ancillary (Open Space, Lockers, etc.)